Publishing Service Requisition

Customer should **complete Section A and either B or C**.

1. Cost Estimate	2. Requisition No.(s)

Section A - General Request

One product may be requested per requisition. Please complete Section A for all requests. See local procedure for funds approval (blocks 13 - 15). This request must be signed by an authorized official in block 10.

3. Title (as printed on item or if there is no title, a description that identifies the item such as, "Memorandum for All Headquarters Employees regarding Tours of Duty")

Form 2587 Application for Special Enrollment Examination

4. Item (e.g. Form 1040 ES (SP) (Skip to block 7 if an item number has NOT been assigned)	5. Catalog No. (e.g. 72534A)	5a. Course Cat. No. (Training Only)	7. Security/Special Handling	8. Date Needed at Destination (Do not use ASAP.)
	1866Q		☐ No	
	6. Item Date (e.g. Rev. 06-2004): 5/2005	6a. Course No. (Training Only)	☐ Yes (Explain.)	5/01/2005

9. Number of Originals or Description of Materials Furnished to Media & Publications. (If electronic, list format, software, version, and file name)

12,600

10. Approving Official Signature	11. Approving Official Name and Title (Please type or print)	12. Date
	Stanley Oshinsky, Chief Licensure & Education	
13. Funds Approval	**14. Appropriation to Charge (e.g., 05050912D-W999100-1D-7530F-2PN99)**	**15. Date**

Section B - Product Request

If this request is for photocopying services only, skip to Section C

16. Request Action (Check one or explain in Block 21)

- [x] **R** Reprint
- [ ] **M** One time
- [ ] **D** Design Only
- [ ] **N** New
- [x] **V Revised**
- [ ] **O** Obsolete
- [ ] **G** Contract
- [ ] **P** Typeset Only
- [ ] **U** Supt. Docs

17. Quantity Requested (Select from a-e and enter estimated quantities below)

(a) Originating office supply: 600
(b) Estimated stock for warehouse orders: 12,000
(c) IMDDS file patterns no. ______
(d) Distribution list attached (for direct distribution to users) ______
(e) Other single address (specified in Block 21) ______
(f) Total Quantity (Add quantities a-e): 12,600

18. Type of Service Desired (Check one or explain in Block 21)

- [ ] Printing & Distribution
- [ ] Presentation Materials (slides, flip charts, color copies)
- [ ] Camera Copy/ Master only
- [ ] Electronic Media: disk, CD, file
- [ ] Other - Use Block 21

19. Functional Description (A short description of the product, its purpose, and when, where and by whom it will be used.)

This form is used by applicants who wish to take the Special Enrollment Examination

20. Supersedes/Superseded by

21. Additional Instructions (Please give a description of any services and products requested. Attach additional sheet if necessary)

Printing & Posting to the Intranet & Inernet(Tax forms & Pubs.)

*please mail 500 copies to
Internal Revenue Service -DCC
Attn: Diane Frederick
985 Michigan Ave. 4th Floor
Detroit, MI 48226

* and 100 copies to:
Off. of Professional Responsiblity
Attn: LaShawn Wilkerson - OPR Rm.7238
1111 Consitition Ave., N.W.
Washington, D.C. 20224

22. Product Originator (Person responsible for content and usage)	23. Office Symbols (e.g. SE:W:CAR:MP)	24. Phone (include area code & ext.)
LaShawn Wilkerson	SE:OPR	202-622-8321

25. Originator Email Address

lashawn.e.wilkerson@irs.gov

26. Name and Phone Number for other Contact Person, if any

Section C - Photocopying Production

Customer: Complete Section C for photocopying request
Inquire locally regarding use of the JCP-Approved copy/printing plant or local photocopying contracts

27. Requester's Name	28. Mail Stop	29. Office Symbols (e.g. SE:W:CAR:MP)	30. Phone (including area code & ext.)	31. Requested Date

32. Reduce / Enlarge
- [ ] 100% (same size)
- [ ] ______

33. Margins
- [ ] as on original/marked
- [ ] center
- [ ] ______" top ______" Left

34. Paper
- [ ] 20# white writing
- [ ] ______

35. Ink
- [ ] Black
- [ ] ______

36. Size
- [ ] 8.5 x 11
- [ ] ______

37. Fold
- [ ] Like sample
- [ ] ______

38. Number of copies Needed

39. Number of Pages
______ printed
______ blank
______ total

40. Printing
- [ ] Print 2 sides (head to head)
- [ ] Print 1 side only
- [ ] ______

41. Binding (Check all that apply)
- [ ] Slip sheet
- [ ] Collate
- [ ] Staple on fold (saddle stitch)
- [ ] Pads of 50
- [ ] Pads of 100
- [ ] 1 Staple, upper left
- [ ] 2 Staples, left side
- [ ] Perfect (glue) or tape
- [ ] 3 hole punch, left
- [ ] 5 hole, punch, left
- [ ] None/Other-block 44

42. Distribution
- [ ] Send to requester
- [ ] See Dist List
- [ ] Call Requester
- [ ] Mailroom
- [ ] File no. ______
- [ ] Other - Block 43

43. Additional Instructions

44. Return Originals to:
- [ ] Requester
- [ ] See Dist. List

45. Return Samples to:
______ Analyst
______ Requester

Instructions for Form 1767

Block 1: Cost Estimate – This will be entered by Media and Publications (M&P).

Block 2: Requisition Number – This will be assigned by M&P.

SECTION A -

Block 3: Title – Enter the title as shown on the product, or if there is no title, give as specific a description as possible including the type of item (memo, flyer, news release, etc.), any date or issue number, and subject.

Blocks 4-6: Item, Catalog Number and Item Date – These fields are required for products with an existing item number.

Item – This consists of the item *type*, the *number* and any *suffix*. The *type* designates the number system used for the product.

The most common *types* are:

Form – Any product used to gather, transmit and/or store information

Document – Any product that distributes information intended for employees. Includes handbooks, newsletters, posters, etc.

Publication – Any product that distributes information to the public. Includes posters, recruitment materials, taxpayer information products, etc.

Manual – Internal Revenue Manual

Package – A product that contains a combination of similar tax forms and instructions.

Letter – Form letter masters are used to communicate with taxpayers. Typically these are sent from the campuses and are personalized.

Notice – Preprinted or computer generated product which is mailed with other materials to taxpayers who meet specific criteria. No personalization.

Envelope – Used for mailing.

Training Publication – Products developed and used primarily for an IRS training class. Commercial products stocked and shipped with class orders are also given training publication numbers.

Instruction – A product that is created to provide guidance on how to complete a form. It will carry the same number as the form and is typically used for tax forms. E.g.; Form 1040 and Inst. 1040.

Item *numbers* for most products have up to 5 digits. Training publications use CCCC-BBB format where CCCC is the course number and BBB is the book number.

A *suffix* for numbered items conforms to the following standards:

(SP) – used to designate a product that has been translated into Spanish.

(PR) – identifies the product that is for use in Puerto Rico.

A, B, C, D, etc. – Designations given to related products such as continuation sheets.

Catalog Number – Assigned by M&P to all products with an item number. It is used primarily for ordering, warehousing and distribution purposes.

Item Date – Typically designates the month and year in which the product is made available for use. For IRMs it can include the day. Tax forms use the four digit year. The abbreviation "Rev." before the date indicates the last date the product was revised.

Block 5a: Course Cat. No. - If known, enter the training course catalog number for which this product will be used. For new courses, the number will be assigned by M&P.

Block 6a: Course No. - Enter the primary training course number for which this publication will be used. This number is provided by the Enterprise Learning Management (ELM) office.

Block 7: Security Handling – Some products (Official Use Only) have a specific use and their usage/storage requires specialized handling. Check with your printing specialist for the guidelines.

Block 8: Date Needed – Enter the date this product is needed for use. DO NOT use ASAP.

Block 9: Number of Originals – Indicate the number and type of originals or 'master' versions of the product being provided. If provided material is electronic indicate the format, software version, file name(s), number of discs, etc.

Blocks 10-12: Approving Official, Approving Official Name and Title, Date – Each request requiring the expenditure of funds or resources must be signed by an authorized official. This signature is required to validate the need to purchase the product in support of the IRS mission. Publishing maintains the list of authorized signatures. Contact your printing specialist with questions regarding the authorized signature list.

Blocks 13-15: Funds Approval, Appropriation to Charge, Date – Each operating division has its own procedure on the approval of funds for publishing requests. Inquire locally regarding funding approval. Requests requiring funding that are not properly approved will be returned to the requester and may delay processing.

SECTION B -

Block 16: Request Action – Use this block to indicate the type of action being requested. Check one box only. The possible actions are:

New – Perform all activities to create a new item for on-going use. This includes, but is not limited to, assigning item and catalog numbers, design, typesetting, printing, binding and distribution.

Revised – Perform all activities to revise a numbered product. A revision consists of any change to a product, including text corrections, title changes, design changes, complete rewrites or any other change. This action includes, but is not limited to, assigning a new item date, designing, typesetting, printing, binding and distributing.

Reprint – Perform all activities to reprint a numbered product to produce additional copies. This includes, but is not limited to, printing, binding and distributing. NOTE: Only the originating office should request reprints. All others should order stock from the National Distribution Center (NDC). Consult Document 7130 for ordering instructions.

One-time – Perform all activities to print an item for one-time use. This includes, but is not limited to, designing, typesetting, printing, binding and distributing. These products are generally information vehicles that will be distributed directly to users to share time-sensitive information and will NOT be stocked for orders. Examples include memoranda, flyers and limited distribution reports.

Design Only – Perform all activities to produce materials that require work from the Graphic/Design Section. This includes presentation materials, awards, color copies and any other materials requiring design work without printing multiple copies.

Obsolete – Perform all activities to remove a product from active use. Products remain in active status until the originator of the product, who is responsible for usage procedures, informs Publishing that the product is obsolete. This action will retire records from active status, destroy any warehouse stock and prevent acceptance of warehouse orders for the item.

Contract – Perform all activities to establish a term contract for printing services. This option is used by Publishing when it is determined that a standard contract will be beneficial to the Service.

Typeset Only – Perform all activities to typeset an item. This action is used to produce camera-ready copy to be used as a master for on-demand printing. Occasionally, it may be beneficial to request typesetting and printing of other items separately when time factors or uncertainties suggest that the project completion has not been assured or may be significantly delayed.

Supt. Docs. – Perform all activities to establish a Government Printing Office (GPO) Superintendent of Documents rider or order. The GPO Superintendent of Documents notifies agencies of upcoming printings of other agency items and solicits rider orders for these items. A rider order increases the quantity of the item being printed and GPO bills IRS for the quantity requested.

Block 17: Quantity Requested – This block contains a worksheet to assist in determining the total quantity needed.

Line (a): Originating office supply - enter the quantity to be sent to the originating office as specified in blocks 25 - 30. Items used on a limited scope which do not require Servicewide availability can be stocked by the originating office. In this case, the quantity requested should reflect the expected need for the product. Inquiries about product availability will be referred to the originating office. For items that are stocked in the NDC, originators may want to keep a minimal supply on hand for casual requests.

Line (b): Estimated stock for warehouse orders - Only for items that will be stocked in the NDC. Enter an estimate of the annual need for the item based on case load volume, employment figures, or other indicators. Publishing may contact you to adjust this figure based on inventory management practices.

Line (c): IMDDS file pattern no. _____ - Standard distribution patterns have been created for established items that are distributed direct to users rather than being placed in the NDC for ordering. Standard patterns are also available for all employee distributions. Receiving offices may add or delete their office or modify their office quantities. If you know the file pattern number used to distribute the item, enter the number. Contact Publishing to determine the current quantity or if you are unsure whether or not a pattern exists or do not know its number.

Line (d): Distribution list attached - When program implementation requires that an item be sent direct to users, and a standard file pattern (see line (c)) does not exist, attach a distribution list for the item and enter the total quantity on line (d).

Line (e): Other single address - If the product should be sent to a single address other than the originating office, specify the name/title and address of the receiver in block 21, Additional Instructions, and enter the quantity on line (e).

Block 18: Type of Service Desired - Check the appropriate box for the type(s) of final product(s) being requested. If you are unsure or do not feel that one of these choices covers your request, explain in block 21, Additional Instructions.

Block 19: Functional Description - A short narrative about the product, its purpose, and when, where and by whom it will be used. This will be included in the IRS Printed Product Catalog. This description assists in determining need and usage.

Block 20: Supersedes/Superseded by: - Enter the item number and catalog number of the superseding or superseded product, if any.

Supersedes - the item listed in this block is being replaced by the product listed in block 4.

Superseded by - used for obsoleting a product, it notates what product should be used in its place.

Block 21: Additional Instructions - Please explain any needs and/or attributes of the product that were not covered in blocks 3-20. Section C can be used for more detailed product specifications and handling if desired.

Block 22: Product Originator - The product originator is the person (and office) responsible for the content of a product and overall procedures for its use. For non-IRS items, the originator is the office administering the program(s) that include the use of the item. Every Item must have an originator who is responsible for it and all requests should come from the originator's office. This block must have the name of the individual who should receive inquiries and improvement suggestions.

Block 23: Originator Office Symbols - Enter the originator's office symbols. PLEASE USE COMPLETE OFFICE SYMBOLS.

Block 24: Originator Phone Number - Enter the phone number of the originator. Please include area code, the 7-digit number, and any additional extension number.

Block 25: Originator VMS and/or email address, if any. - Enter the originator's VMS number or email address if either or both of these can be used to contact the originator.

Block 26: Name and Phone Number for Other Contact Person, if any - Enter the name of any other contact person in case the originator cannot be contacted and indicate their position/relationship such as backup, manager, etc.

SECTION C -

This section can be used to provide additional information regarding the request that was not covered elsewhere on this form. However, if this request is only for photocopying services, Section C must be completed.

Blocks 27-31: Requester's Name, Mail stop, Office Symbols, Phone and Requested Date – Complete this information for the person requesting the copying.

Block 32: Enlarge/Reduce – Check 100% if the copies should be made the same size as the original. Otherwise, check the other box and write in the percentage enlargement or reduction or enter the final image size in block 43.

Block 33: Margins - Check "as on original/marked" if the margins should be the same as on the original or if you have marked the margin width. Check "center" if the image should be centered on the paper. Otherwise, specify either top and left (or bind) margins.

Block 34: Paper - Check "20# white writing" for standard copy paper. Write in any other request. Limited selections are stocked, so contact Publishing if you have questions about available paper.

Block 35: Ink - Check "black" for standard black. Write in any other request. Contact Publishing if you have questions about available colors.

Block 36: Size - Check "8.5 x 11" for standard copy paper size. Write in any other request.

Block 37: Fold - Check "like sample" and attach a sample folded as desired. Otherwise, describe the desired folding. Not all production facilities have folding capabilities.

Block 38: Number of Copies Needed - Enter the number of copies requested. Please remember that paper, copier and other associated costs add up quickly, so request only those copies that you need.

Block 39: Number of Pages - Enter the number of printed pages and the number of blank pages in the final product, counting each side of the paper as one page. Add these numbers and enter the total number of pages to be produced.

Block 40: Printing - Our policy is to use both sides of the paper whenever possible to conserve both money and natural resources. Check "Print 2 sides" for two-sided copying with the top of the pages in the same direction. Check "Print 1 side only" if there is an overriding reason to print the product only on one side of the paper. Write in any special requests such as copy 2 sides head to foot (the top of the second page is at the bottom of the first page).

Block 41: Binding - Check the desired binding method(s) for the product. All methods may not be available in all locations. The selections are:

Slip Sheet: Place a blank sheet of paper between copies of the product.

Collate: Collate copies of the pages into sequential order as in the original.

Staple on fold: Staple multiple pages together along the spine. Typically used for small books or booklets.

Pads of 50: Create a pad of 50 identical sheets with chipboard back.

Pads of 100: Create a pad of 100 identical sheets with chipboard back.

1 staple, upper left: Staple each product in the upper left corner.

2 staples, left side: Staple each product with 2 staples along the left side.

Perfect (glue) or tape: Bind each product with a separate cover using glue or tape.

3- hole punch, left: Drill with 3 standard looseleaf holes on the left side.

5-hole punch, left: Drill with 5 standard binder holes on the left side.

None / Othr-block 44: No binding required or other needs are explained in block 44.

Block 42: Distribution - Specify how the project should be handled when completed. Options are:

Send to requester: Send to the person in block 27 at the office symbols or mail stop in blocks 28-29.

See dist. list : A distribution list must be attached. Send the specified number of copies to each address / mail stop listed.

Call requester-pickup: Call the requester at the phone number in block 30 when completed and the requester will pick up the product from the copy center.

Mailroom: Send the product to the mailroom for distribution.

File no.: Distribute the product via a standard IMDDS file pattern number. Specify the file pattern number.

Other-block 44: Specify other distribution in block 43, Additional Instructions. Please call your copy center or Publishing to determine other available options.

Block 43: Additional Instructions / Requester's Address - Specify any additional instructions or special requirements. The requester's street address should be entered in this block if copies, samples or originals must be sent to the requester.

Block 44: Return originals to - Check "Requester" if the originals should be returned to the requester.

Block 45: Return samples to - Enter the number of samples to be returned to the requester only if the completed product is NOT being sent to the requester.